



# State of Medicare in California

California's Inaugural  
Medicare Convening

February 26, 2026

9:00 am – 4:00 pm

Sheraton Grand, Sacramento, CA

[www.stateofmedicarecalifornia.org](http://www.stateofmedicarecalifornia.org)

8:00 am – 9:00 am	Convening Check-In and Breakfast Refreshments
9:00 am – 9:10 am	<b>Convening Welcome</b> <i>Athena Chapman, MPP, President, Chapman Consulting</i>
9:10 am – 9:40 am	<b>Opening Keynote</b> <i>Lauren Gavin Solis, MPH, Deputy Director, Office of Medicare Innovation and Integration, Department of Health Care Services</i>
9:40 am – 10:00 am	<b>Morning Remarks</b> <i>June Simmons, MSW, President and Chief Executive Officer, Partners in Care Foundation</i>
10:00 am – 10:20 am	Coffee Break – Sponsored by Center for Elders’ Independence
10:20 am – 11:05 am	<b>Moving from Fragmentation to Coordination in a Changing Landscape</b> <ul style="list-style-type: none"> <li>• Moderator: Sarah Steenhausen, Deputy Director of Policy, Research, and Engagement, California Department of Aging</li> <li>• Aneliza Del Pinal, Chief Executive Officer, Sourcewise</li> <li>• Christy Ann Lau, MSSW, Vice President, Community Integration, Partners in Care Foundation</li> <li>• Katie Panarella, MS, MPH, Program Director, Community Supports, Anthem Blue Cross</li> </ul>
11:05 am – 11:15 am	Break
11:15 am – 12:00 pm	<b>Integrated Care for Medically and Socially Complex Older Adults: Promising Models and Future Directions</b> <ul style="list-style-type: none"> <li>• Moderator: Val Sheehan, MPH, Chief Executive Officer, CalPACE</li> <li>• Peter Fitzgerald, Chief Strategy Officer, National PACE Association</li> <li>• Kate Meyers, Senior Program Officer, People-Centered Care, California Health Care Foundation</li> <li>• Sarita A. Mohanty, MD, MPH, MBA, President and Chief Executive Officer, The SCAN Foundation</li> <li>• Susan Philip, MPP, Deputy Director of Health Care Delivery Systems, Department of Health Care Services</li> </ul>
12:00 pm – 1:00 pm	Networking Lunch
1:00 pm – 1:45 pm	<b>Innovative Models to Serve Older Adults with Dementia in California</b> <ul style="list-style-type: none"> <li>• Moderator: Gretchen Schroeder, MPH, Senior Policy Director, Chapman Consulting</li> <li>• Krista Harrison, PhD, Associate Professor of Health Policy and Geriatrics, University of California San Francisco Department of Medicine</li> <li>• Kathy Lee, MPH, Healthcare Consultant/Caregiver</li> <li>• Jane Ogle, Former Department of Health Care Services and Health Plan Executive</li> <li>• Yumi Taylor, MD, CEO/Founder, HöttoCare Dementia Supports</li> </ul>
1:45 pm – 2:00 pm	<b>A Conversation: Reimagining Aging in Partnership with Community</b> <ul style="list-style-type: none"> <li>• Rigo J. Saborio, MSG, President and Chief Executive Officer, Archstone Foundation</li> <li>• Laura Rath, PhD, MSG, Vice President of Programs, Archstone Foundation</li> </ul>
2:00 pm – 2:45 pm	<b>Delivering on the Promise of Integration: Next Steps for Dually Eligible Californians</b> <ul style="list-style-type: none"> <li>• Moderator: Gretchen Nye, MPH, Policy Director, Chapman Consulting</li> <li>• Chris Esguerra, MD, Chief Medical Officer, Health Plan of San Mateo</li> <li>• Dustin Harper, Chief Strategy Officer, Institute on Aging</li> <li>• Julianne Holloway, Executive Director, Medicare Duals, Blue Shield of California Promise Health Plan</li> <li>• Rebecca Sullivan, Director of Government Affairs, CalAIM &amp; MTLSS, Local Health Plans of California</li> </ul>
2:45 pm – 3:00 pm	Break
3:00 pm – 3:45 pm	<b>Fireside Chat with California’s Health Care Leaders</b> <ul style="list-style-type: none"> <li>• Moderator: Athena Chapman, MPP, President, Chapman Consulting</li> <li>• Susan DeMarois, Director, California Department of Aging</li> <li>• Lauren Gavin Solis, MPH, Deputy Director, Office of Medicare and Medicaid Integration, Department of Health Care Services</li> <li>• Mary Watanabe, Director, Department of Managed Health Care</li> </ul>
3:45 pm – 4:00 pm	<b>Closing Remarks</b> <i>Athena Chapman, MPP, President, Chapman Consulting</i>



# State of Medicare in California

## California's Inaugural Medicare Convening



### A Note from Athena

It is a true privilege to welcome you to the inaugural State of Medicare in California Convening. I am deeply grateful that each of you has taken time out of your busy schedules to prioritize this opportunity to engage in conversation, collaboration, and partnership. Each of you represents a vital part of California's Medicare landscape, and our system is strongest when we come together with shared purpose and a common vision for the future. What we build through alignment today has the potential to meaningfully shape the system tomorrow.

For me, and for all of you in this room, our commitment to improving care for older adults and people with disabilities is both professional and deeply personal. California is home to more than six million Medicare beneficiaries, each representing a person, a family, and a community that depends on a system shaped by policy choices, program design, and effective implementation. Through your daily work to advance ambitious efforts to improve care quality, access, and outcomes, you bring critical perspectives, operational insight, and deep expertise in how the Medicare landscape functions and how it can be strengthened to better serve Californians.

In my work and interactions across the system, I consistently hear the need for a dedicated space where regulators, providers, health plans, advocates, and policy leaders can come together for honest, forward-looking conversations about Medicare's role in our state. California has long been a leader in innovative thinking and delivery system reform, and leveraging your collective wisdom gives us the opportunity to think strategically about the direction of Medicare's future in our state.

Over the course of this convening, we will examine the unique Medicare landscape in California, hear from experts on how we can adapt to meet the needs of our diverse population, assess the impacts and opportunities of key state initiatives, and consider how California can continue to lead nationally.

Thank you for being here and for contributing your insight and perspective. I encourage you to use this time to be candid, curious, and solution-oriented and to challenge assumptions, share lessons learned, and identify where collaboration can move us further than any of us could go alone.

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## Detailed Agenda

### Convening Check-In and Breakfast Refreshments

8:00 am – 9:00 am

### Convening Welcome

9:00 am – 9:10 am

#### Speaker

**Athena Chapman, MPP, President, Chapman Consulting**



Athena Chapman, MPP, President and founder of Chapman Consulting, provides strategic planning, meeting facilitation, and organizational support to private, non-profit, and government organizations. Her expertise includes policy and regulatory analysis, stakeholder engagement, strategic partnerships, and program implementation. Previously, she served as Vice President of State Programs for the California Association of Health Plans (CAHP) and as a Branch Chief at the Department of Health Care Services (DHCS). Athena began her career as a Presidential Management Fellow with the Centers for Medicare & Medicaid Services (CMS).

### Opening Keynote

9:10 am – 9:40 am

#### Speaker

**Lauren Gavin Solis, MPH, Deputy Director, Office of Medicare Innovation and Integration, Department of Health Care Services**



Lauren Gavin Solis is the Chief of the DHCS Office of Medicare Innovation and Integration, providing focused leadership for Medicare topics in California, including both dually eligible and Medicare-only beneficiaries. Prior to joining DHCS in 2025, she spent 12 years at the federal Medicare-Medicaid Coordination Office at CMS, most recently serving as the Acting Director of the Models, Demonstrations, and Analysis Group. Lauren also previously served as a Presidential Management Fellow at the National Institutes of Health, and worked for the National Coalition on Health Care and Triage Consulting Group. Lauren holds an MPH from the Johns Hopkins Bloomberg School of Public Health and a BA from the University of California at Davis.

### Morning Remarks

9:40 am – 10:00 am

#### Speaker

**June Simmons, MSW, President and Chief Executive Officer, Partners in Care Foundation**



June Simmons, an esteemed health care executive, stands at the forefront of patient-centered care integration. As the founding President and CEO of Partners in Care Foundation, she has pioneered evidence-based interventions, transformative medication management, chronic condition support, and seamless care transitions. Through her leadership at Partners, the Community Care Hub model was pioneered, emphasizing robust partnerships among medical, home, and community-based services, and positioning Partners as a national leader in shaping a visionary healthcare landscape.

June's contributions have garnered national acclaim, including her pivotal roles as the founding Co-Chair of the Partnership to Align Social Care in 2021 and the LA County Regional Coordinating Council for Aging and Disability in 2024. She is widely regarded as a national thought leader, frequently called upon to advise policymakers, health plans, and community leaders on advancing integrated care models. Her visionary leadership and groundbreaking work have solidified her reputation as a beacon of transformative impact.

### Coffee Break – Sponsored by Center for Elders' Independence

10:00 am – 10:20 am

**Center for Elders' Independence has been helping at-risk seniors in The East Bay live at home rather than in nursing homes for over 40 years. They prioritize helping participants lead an independent lifestyle while helping them maintain and improve their overall health.**

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## Moving from Fragmentation to Coordination in a Changing Landscape

10:20 am – 11:05 am

Medicare beneficiaries, especially older adults and people with disabilities who have complex medical and social needs, frequently encounter a fragmented landscape of health care, long-term services and supports, and community programs. This moderated session will bring together provider, health plan, and aging services leaders to unpack the navigation challenges facing older adults and people with disabilities in Medicare, including access barriers, siloed systems, and care coordination gaps.

Panelists will spotlight promising navigation approaches that bridge these divides, with a focus on models that integrate social needs screenings, coordinated referrals, and sustained partnerships with community-based organizations (CBOs). This discussion will examine how these partnerships are formed and sustained in practice, highlighting clear points of entry for organizations at different stages of readiness, and explore how funding across Medicare, Medi-Cal, and local sources can be aligned to support sustainable infrastructure and expand service reach.

This session will also explore the emerging role of Community Care Hubs and other related approaches in streamlining contracting, enhancing data sharing, and strengthening CBO capacity to better support older adults.

### Moderator

**Sarah Steenhausen, Deputy Director of Policy, Research, and Engagement, California Department of Aging**



Sarah Steenhausen serves as Deputy Director of the Division of Policy, Research, and Engagement at the California Department of Aging. In this role, she collaborates with state departments and stakeholders in developing policy and research impacting older adults, people with disabilities and caregivers to advance system change and realize the goals of California's Master Plan for Aging. Previously, Sarah served as Director of Policy and Advocacy at The SCAN Foundation where she focused on policy solutions to improve the system of care serving older adults and their family caregivers.

Sarah began her policy career in 2001 as a Consultant to the Senate Subcommittee on Aging and Long-Term Care. After her tenure in the Legislature, she served as Assistant Secretary for Long Term Care at the California Health and Human Services Agency, and later as Assistant Director for Strategic Planning at the Department of Developmental Services.

### Speakers

**Aneliza Del Pinal, Chief Executive Officer, Sourcewise**



Aneliza Del Pinal is a transformational leader advancing the future of aging in California. As Chief Executive Officer of Sourcewise, the Area Agency on Aging for Santa Clara County, she leads systems-level change that expands equity, access, and innovation across the aging and disability ecosystem. Under her

leadership, Sourcewise has extended services into previously unserved communities and launched thirteen new programs, including CalAIM initiatives that integrate health care and social supports to improve outcomes for older adults, people with disabilities, and caregivers.

As President of the California Association of Area Agencies on Aging (C4A), Aneliza drives statewide policy and strategic action to help build aging systems that are integrated, inclusive, and responsive to California's shifting demographics. She is deeply committed to bridging health, social care, and community systems to deliver scalable, future-ready solutions.

Aneliza contributes to county, state, and national initiatives and remains an active voice within USAging.

**Christy Ann Lau, MSSW, Vice President, Community Integration, Partners in Care Foundation**



Christy Ann Lau, MSSW is the Vice President of Community Integration at Partners in Care Foundation, overseeing Partners' Community Care Hub, Workforce Development Training Center, and Community Wellness departments. She began her career at Partners in 2016 as a Program Director in Community

Wellness, leading statewide implementation and spread of evidence-based chronic disease self-management and falls prevention programs through federal funding from the Administration for Community Living, and local Title III-D Older Americans Act funds. Prior to joining Partners, Christy worked at UCLA in the Division of Geriatrics. Christy holds a Master of Science in Social Work degree from Columbia University and completed her Bachelor's degree in Psychology at Pepperdine University. She has over 15 years of experience in strategic planning, partnership building, training, and grants and project development and implementation.

**Katie Panarella, MS, MPH, Program Director, Community Supports, Anthem Blue Cross**



Katie Panarella serves as the Community Supports (CS) Program Director at Anthem Blue Cross in the CA Medicaid division. Katie has led the development and implementation of the Community Supports program as well as several CalAIM initiatives including Enhanced Care Management (ECM), Community

Health Worker, Doula and ICF-DD since its inception. Her professional journey has been dedicated to the development of impactful public health and food security initiatives at the local, state, and federal levels. She is deeply committed to collaborating with community partners to forge innovative solutions that enhance health outcomes for underserved and marginalized communities. Katie holds a BS in Environmental Economics and Policy from the University of California, Berkeley, and a dual MS/MPH in Food Policy and Applied Nutrition from Tufts University.

**Break**

**11:05 am – 11:15 am**

**Integrated Care for Medically and Socially Complex Older Adults: Promising Models and Future Directions**

**11:15 am – 12:00 pm**

California’s aging population is expected to increase threefold by 2030, bringing a rapidly growing number of older adults with complex medical, functional, and social needs, many of whom meet or are approaching a nursing facility level of care. Meeting these needs requires a coordinated system that integrates clinical care, long-term services and supports, and attention to social drivers of health (SDOH) and the essential role of paid and unpaid caregivers.

While the Program of All-Inclusive Care for the Elderly (PACE) remains one of the most comprehensive models for person-centered care for this population, it is only one part of a broader ecosystem that includes Home and Community-Based Services (HCBS) providers, Medicare and Medi-Cal aligned health plans, community-based organizations, nutrition and social service partners, and primary care. This session will explore how California can build the capacity and capabilities of these models and players to best serve medically fragile older adults, reduce fragmentation, and expand high-quality options for those who want to remain safely at home and connected to their communities, especially as the growth of the older adult population stretches current capacity.

Panelists will examine gaps and opportunities across funding streams, delivery systems, and program design with

a goal of centering the lived experiences of frail older adults. The discussion will highlight innovations, partnerships, and policy developments that shape the future of integrated care for older adults with the highest needs. It will also explore how California can grow capacity across the continuum rather than relying on any single model. Together we will look at practical strategies to build a cohesive, person-centered system that honors choice, advances equity, and supports older adults to live with dignity and independence.

**Moderator**

**Val Sheehan, MPH, Chief Executive Officer, CalPACE**



Val Sheehan is the CEO of the California PACE Association or CalPACE, a not-for-profit trade association representing the Program of All-Inclusive Care for the Elderly (PACE) organizations serving medically complex and predominantly low-income older Californians. Prior to her role at CalPACE, she served as the

Senior Vice President and Chief Program Officer at the California Primary Care Association, a membership association of 150 nonprofit community clinics and health centers serving over 7 million Californians.

Before becoming an association executive, Val served in a variety of roles focusing on health care, health equity, and social justice. Val managed a prominent leadership and capacity-building program for the Public Health Institute, served as a program officer and grant maker at a Bay Area community foundation called the Asian Pacific Fund, and spent several years at Kaiser Permanente as a senior health educator.

Val holds a Master of Public Health (MPH) from the University of California, Berkeley; a Bachelor of Arts (BA) with honors in American Studies from the University of California, Santa Cruz; and most recently, Val received a certificate from the UCLA Anderson School of Management/Johnson & Johnson Health Care Executive Program.

**Speakers**

**Peter Fitzgerald, Chief Strategy Officer, National PACE Association**



Peter Fitzgerald is the Chief Strategy Officer at the National PACE Association, where he plays a pivotal role in advocating for and supporting the Program of All-Inclusive Care for the Elderly (PACE). With a background in healthcare policy and finance, Peter has been instrumental in advancing initiatives that enhance

quality of care and quality of life for older adults. His writings on improving the health care system have been featured in the New York Times, Harvard Business Review and numerous peer-reviewed journals. Peter holds a degree in Health Care Planning and Financing from the London School of

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Economics and has previously worked with various healthcare organizations, contributing to significant policy reforms and community engagement projects. Peter serves on the boards of several nonprofits, including his local community health center, Empath Health's Complete Care Division, and the Starlight Fund for Girls. Outside of his professional commitments, Peter enjoys travel, dog walks and spending time with friends and family.

**Kate Meyers, Senior Program Officer, People-Centered Care, California Health Care Foundation**



Kate Meyers is a senior program officer with CHCF's People-Centered Care team, which works to ensure that Californians – particularly those enrolled in Medi-Cal – receive responsive, comprehensive, and coordinated care that supports their health and well-being. Her work focuses on care for older adults with complex needs. Before joining the foundation in 2017, Kate worked for eight years as an independent consultant managing initiatives to expand access to community-based palliative care in California and to spread the lessons learned by pioneering organizations involved in this work. Prior to that, she worked at Kaiser Permanente in roles focused on improving the care of older adults and reducing racial and ethnic disparities in health and health care. Her professional background also includes work in self-management support for chronic conditions, integrated care for opioid overuse, and maternity care. Kate received a bachelor's degree in history from Colgate University and a master's degree in public policy from the University of California, Berkeley.

**Sarita A. Mohanty, MD, MPH, MBA, President and Chief Executive Officer, The SCAN Foundation**



Sarita A. Mohanty, MD, MPH, MBA, serves as President and Chief Executive Officer of The SCAN Foundation (TSF), one of the nation's largest philanthropic organizations focused on improving the quality of health and life for older adults. Under her leadership, TSF has embraced a bold new vision: shaping a future where aging is inclusive, equitable, and rooted in community and lived experience. Through its grantmaking, partnerships, and mission-aligned investments, the Foundation drives systems change so that all older adults—especially those facing structural barriers—can age with dignity, purpose, and independence.

Before joining TSF, Dr. Mohanty served as Vice President of Care Coordination for Medicaid and Vulnerable Populations at Kaiser Permanente, leading initiatives to improve outcomes for people with complex care needs. She previously held leadership roles as Assistant Professor of Medicine at the University of Southern California, Chief

Medical Officer at COPE Health Solutions, and Senior Medical Director at L.A. Care Health Plan, the largest public health plan in the country.

Dr. Mohanty completed her Internal Medicine residency at Beth Israel Deaconess Medical Center and a research fellowship at Harvard Medical School. She earned her MD from Boston University, MPH from Harvard University, and MBA from UCLA, after completing her undergraduate studies at UC Berkeley.

A Forbes "50 Over 50" honoree (2023) and UC Berkeley Social Impact Fellow (2025–2026), Dr. Mohanty continues to practice internal medicine with Kaiser Permanente and has served on several national and state boards focused on quality, aging, and health equity. She enjoys international travel, tennis, and spending time with her husband and three children.

**Susan Philip, MPP, Deputy Director of Health Care Delivery Systems, Department of Health Care Services**



Susan Philip, MPP, was appointed by Governor Gavin Newsom as the Deputy Director of Health Care Delivery Systems at the Department of Health Care Services (DHCS) in March 2021. She is responsible for oversight of three divisions: Managed Care Operations, and Managed Care Quality and Monitoring; and Integrated Systems of Care. Her areas of responsibility include the oversight, monitoring, and contract administration of California's Medi-Cal managed care program, the California Children Services (CCS) program, and Home and Community-Based Services (HCBS) Waivers programs. She is also responsible for driving key initiatives under California Advancing and Innovating Medi-Cal (CalAIM) including Community Supports and Providing Access and Transforming Health (PATH).

Prior to her appointment, Susan served in a variety of roles in the health care sector including in leadership positions for over 25 years. For a decade she served in consulting roles at Milliman and Booz Allen Hamilton working with a diverse group of state, federal, and private sector clients on driving improvements and transformation in the health care delivery system through value-based and quality initiatives. Earlier in her career, she served in policy development and analysis roles as Director for the California Health Benefits Review Program, at the University of California, Office of the President and as Policy Analyst for the Medicare Payment Advisory Commission in Washington, DC. In her volunteer time, Susan has served on boards including a federally qualified health center working with the LGBTQ community as well as people experiencing homelessness. She is currently on the board of directors of SafeHouse, which provides transitional housing and support services for survivors of trafficking.

Susan has an AB in Economics and English, from Columbia University, and a MPP in Health Policy and Nonprofit Studies from Georgetown University, McCourt School of Public Policy.

## Networking Lunch

12:00 pm – 1:00 pm

Optional: Join an Affinity Table!

If interested, join us for informal, facilitated lunchtime discussions designed to connect participants around shared interests and lived expertise. We will have five affinity tables which will provide space for peer learning, idea-sharing, and candid conversation on key issues shaping Medicare and aging policy in California. Participants are invited to join a table aligned with their interests, including: Community Partnerships, Integrated Care Models (e.g., PACE), Dementia Care, Dual Eligible Individuals and D-SNPs, and Behavioral Health. All are welcome. Grab your lunch, and join a table to listen, share, and connect.

## Innovative Models to Serve Older Adults with Dementia in California

1:00 pm – 1:45 pm

This facilitated conversation will highlight emerging approaches to better support older adults living with dementia from diagnosis to death across California's Medicare, Medi-Cal, Long-Term Services and Supports, and Veterans Affairs landscape. Bringing together policy, provider, and research perspectives, the conversation will explore what it takes to move from fragmented services to more coordinated, person- and caregiver-centered models, spotlighting promising innovations such as the GUIDE Model and the partnerships, financing strategies, and workforce supports needed to scale what works.

### Moderator

**Gretchen Schroeder, MPH, Senior Policy Director, Chapman Consulting**



Gretchen Schroeder, MPH, Senior Policy Director with over 20 years of experience working with community-based organizations, counties, and healthcare providers to transition to new Medi-Cal programs, payment models, and contracts. Gretchen is a community health strategist with experience in

public health policy, program implementation and management, and systems change. She has expertise in translating policies into meaningful change.

## Speakers

**Krista Harrison, PhD, Associate Professor of Health Policy and Geriatrics, University of California San Francisco Department of Medicine**



Krista Harrison, PhD, is a social scientist and an Associate Professor in the Division of Geriatrics and the Philip R. Lee Institute for Health Policy Studies at the University of California, San Francisco. Her research aims to mitigate suffering associated with aging, dying, and grieving by improving policies and models of

hospice and home-based care for people impacted by serious illness. She utilizes qualitative (interviews, observations, case studies, focus groups) and quantitative (nationally representative survey and Medicare claims data) to examine needs and inform innovations in hospice, palliative, and end-of-life care, often focused on people living with dementia and their families. Dr. Harrison completed her PhD in health policy and bioethics at the Johns Hopkins Bloomberg School of Public Health; postdoctoral training in aging research and implementation science at UCSF, and an Atlantic Fellowship for Brain Health at the Global Brain Health Institute. Before joining UCSF, Dr. Harrison was an administrator at a large nonprofit community-based hospice and palliative care organization. Learn more: <https://heard.ucsf.edu/> or <https://geriatrics.ucsf.edu/harrison-network>

**Kathy Lee, MPH, Healthcare Consultant/Caregiver**



Kathy Lee is a healthcare consultant with 20 years of experience in strategy, operations, and partnerships across the healthcare ecosystem. She currently supports growth and partnerships at HöttoCare, a participant in the CMS GUIDE Model.

Kathy has led strategic operations, partnership management, and enterprise initiatives across complex environments, from leading academic health systems, including Massachusetts General Hospital and Stanford Health Care, to startups and national medical groups. Her experience spans value-based care and alternative payment models, including BPCI, as well as state-wide health data sharing and interoperability. Most recently, she served as Director of Customer Success at Manifest MedEx, California's largest nonprofit health data network.

Kathy specializes in translating strategic vision into operational excellence and enabling multi-sector collaboration to scale innovative care models. A UCLA and Yale alumna, she holds a BS in Psychobiology and an MPH in Health Care Management. She is deeply committed to advancing integrated health and social care for older adults, informed by lived experience supporting parents living with dementia.

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## Jane Ogle, Former Department of Health Care Services and Health Plan Executive



Jane Ogle is the former Deputy Director for Healthcare Delivery Systems at the California Department of Health Care Services. She is currently an independent Consultant working on several assignments including: the DHCS Academy, an 11- part, year-long, educational program for mid-level DHCS managers; strategies to integrate providers of services to special populations such as the unhoused or those dealing with addition; activities to identify and educate families living with dementia about services available through CalAIM; and other CalAIM programs and policies that affect the dual eligible population. At the DHCS she was responsible for the expansion of Medi-Cal Managed Care to the childless adult population and to the Health Families population. She was also responsible for California Children's Services and long-term care services. Ms. Ogle led the Coordinated Care Initiative in 7 counties that integrates Medicare and Medi-Cal services with long term services and supports through managed Medi-Cal health plans. In her role at the DHCS, Ms. Ogle acted as the liaison with several community-based and advocacy organizations. In addition, she has consulted with counties about the CalAIM initiatives to redesign behavioral health. Prior to her work at the state, she was the first COO at Santa Clara Family Health Plan. She spent more than 20 years in hospital administration at hospitals in Trenton and Princeton, New Jersey. Ms. Ogle is a graduate of Georgetown University, School of Foreign Service.

## Yumi Taylor, MD, CEO/Founder, HöttoCare Dementia Supports



Dr. Yumi Taylor is a physician, healthcare innovator, and founder of HöttoCare, a dementia care model designed to help people living with dementia remain safely at home while supporting the family caregivers who make aging at home possible. She began her career as a caregiver in a community group home and later practiced as a primary care physician in her rural hometown, delivering care across hospitals, post-acute settings, home visits, nursing facilities, free clinics, Medicaid clinics, and office-based primary care. This full-continuum experience gave her a firsthand understanding of how fragmented and misaligned dementia care has become.

Seeking system-level change, Dr. Taylor returned to Stanford for executive healthcare management and technology training, where she also spent time working with the Google brain team bringing AI applications to healthcare. She went on to lead multidisciplinary teams of clinicians, engineers, and designers at Sutter Health's innovation center and the

health plan, helping build a virtual, team-based primary care model that exceeded quality and experience benchmarks.

She founded HöttoCare to bring this innovation to dementia care through a Medicare-aligned, caregiver-centered approach. Dr. Taylor is board-certified in Internal Medicine and Clinical Informatics and has practiced medicine for 19 years.

## A Conversation: Reimagining Aging in Partnership with Community

1:45 pm – 2:00 pm

This discussion between Rigo Saborio, President and CEO of Archstone Foundation, and Laura Rath, Vice President of Programs of Archstone Foundation, will offer a candid conversation about how Archstone Foundation is working to reimagine care for older adults in California. They will talk through current foundation-supported projects that integrate health and social care, strengthen Long-Term Services and Supports, and respond to the lived realities of California's diverse older adult communities. The discussion will also explore Archstone Foundation's new strategic plan, with a focus on engaging older adults as advocates for their own health and as partners in shaping more responsive systems of care.

### Speakers

#### Rigo J. Saborio, MSG, President and Chief Executive Officer, Archstone Foundation



Rigo J. Saborio, MSG, brings more than 30 years of leadership in aging services, with expertise in public policy, equity initiatives, administration, and direct service. Before joining Archstone Foundation, he served as Vice President of Programs, Equity, and Community Impact at The SCAN Foundation, leading community engagement and advancing diversity, equity, and inclusion to improve access to aging supports. Previously, Rigo was Chief Executive Officer of St. Barnabas Senior Services for 13 years and spent eight years with AARP, culminating as Director of Diversity Outreach and Alliances at the national office. He also directed the USC Los Angeles Caregiver Resource Center and served as a staffer for the U.S. House of Representatives' Select Committee on Aging. Rigo has held numerous leadership and advisory roles across California's aging sector. He holds a Master of Science in Gerontology from USC and a bachelor's degree in nutritional sciences from Cal State LA.

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**Laura Rath, PhD, MSG, Vice President of Programs,  
Archstone Foundation**



Laura Rath is Vice President of Programs at Archstone Foundation. She provides leadership for the Foundation's grant programs in partnership with communities to catalyze equitable change in health and social care systems. She brings more than twenty-five years of experience in the aging, non-profit, and philanthropic sectors. Both personally and professionally, her work is focused on improving the health, quality of life, and security for people of all ages. She currently serves on the Board of Directors for Summer Harvest and has previously served on the board for Grantmakers In Aging (GIA). She holds a Doctor of Philosophy and a Master of Science in Gerontology from the University of Southern California.

**Delivering on the Promise of Integration:  
Next Steps for Dually Eligible Californians**  
2:00 pm – 2:45 pm

Dually eligible beneficiaries—individuals enrolled in both Medicare and Medi-Cal—represent some of California's most medically complex, socially vulnerable, and high-need residents. While they comprise a relatively small share of total Medi-Cal enrollees, dually eligible Californians account for a disproportionate share of health care spending and frequently experience fragmented care across two programs with different rules, financing, and accountability structures. Improving integration for this population is therefore essential to advancing equity, improving outcomes, and ensuring the sustainability of California's health care system.

This moderated panel discussion will explore how Medicare Medi-Cal Plans (Dual Eligible Special Needs Plans operating with exclusively aligned enrollment or EAE) can build on recent state efforts to improve meaningful Medicare and Medi-Cal integration, including nontraditional Medicare providers, CalAIM reforms, D-SNP alignment, and MLTSS, to more fully deliver on the promise of coordinated, person-centered care. Panelists will reflect on lessons learned to date, examine persistent barriers across policy, operations, and care delivery, and discuss practical next steps to strengthen coordination, accountability, and the beneficiary experience.

**Moderator**

**Gretchen Nye, MPH, Policy Director,  
Chapman Consulting**



Gretchen Nye, MPH, Policy Director, has nearly 15 years of experience in health policy, healthcare operations, and managed care expertise, particularly as it pertains to individuals dually eligible for both Medicare and Medicaid. In her prior role as technical advisor in the Centers for Medicare & Medicaid Services (CMS) Medicare-Medicaid Coordination Office, Gretchen oversaw both the operations and transition of the Capitated Financial Alignment Initiative, working closely with, and providing ongoing technical assistance to, the participating states and managed care plans. She also directed CMS regulatory work intended to improve the care delivery experience of dually eligible individuals in managed care through dual eligible special needs plans integrated with Medicaid managed care organizations.

**Speakers**

**Chris Esguerra, MD, Chief Medical Officer,  
Health Plan of San Mateo**



An experienced systems leader, Chris Esguerra MD MBA, drives equitable outcomes through systems transformation, partnerships, and integration. He is the chief medical officer for Health Plan of San Mateo, a public not for profit plan serving low-income individuals, seniors, and those living with disabilities. He is a board certified psychiatrist with experience in providing care in the community.

**Dustin Harper, Chief Strategy Officer,  
Institute on Aging**



Dustin Harper is the Chief Strategy Officer at Institute on Aging. Dustin has 20 years of management and executive experience developing home and community-based programs for older adults in for-profit, non-profit and government settings. He has helped develop IOA into a trusted statewide service provider, predominantly serving low-income older adults and people with disabilities.

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**Julianne Holloway, Executive Director, Medicare Duals, Blue Shield of California Promise Health Plan**



Julianne Holloway is the Executive Director of Medicare Duals at Blue Shield of California with more than 17 years of experience in managed care across Medicare, Medicaid, and Dual Eligible programs. She specializes in D SNPs and integrated care models, with deep expertise in translating CMS and Medicaid policy into coordinated, compliant program execution for complex populations. Her work focuses on navigating the intersection of Medicare and Medicaid requirements to support person centered care and sustainable integrated program design. Julianne partners closely with clinical, operations, compliance, and policy teams to advance effective integration and improved outcomes for Dual Eligible members. She holds a Master of Public Health from Johns Hopkins University and brings a policy informed, practical perspective shaped by years of hands on implementation in evolving regulatory environments.

**Rebecca Sullivan, Director of Government Affairs, CalAIM & MTLSS, Local Health Plans of California**



Ms. Sullivan serves as the primary liaison for LHPC on CalAIM and MLTSS issues affecting Medi-Cal managed care plans, advancing local plans' policy priorities with regulatory agencies, boards, the Legislature and other stakeholders in the health care arena.

With a diverse background in both law and health care policy, Rebecca is an expert on complex issues affecting local plans and Medi-Cal managed care programs. As the Government and Regulatory Affairs Manager for the Health Plan of San Mateo (HPSM), she oversaw the implementation of new state and federal policy initiatives, ensured the plan's internal operations were in compliance with various contractual and regulatory obligations, and worked closely with state and federal agencies.

Rebecca earned a Bachelor of Arts degree from Sonoma State University and a Juris Doctor from Santa Clara University School of Law.

**Break**

**2:45 pm – 3:00 pm**

**Fireside Chat with California's Health Care Leaders**

**3:00 pm – 3:45 pm**

In this fireside chat, senior leaders from California's aging, health care, and regulatory agencies will discuss how to ensure that California's Medicare system is responsive to the needs of older adults and people with disabilities, as well as the individuals and systems that support them. The conversation will focus on how governance, oversight, alignment across programs, and targeted innovation can be used to strengthen Medicare in California over the next decade.

**Moderator**

**Athena Chapman, MPP, President, Chapman Consulting**



Athena Chapman, MPP, President and founder of Chapman Consulting, provides strategic planning, meeting facilitation, and organizational support to private, non-profit, and government organizations. Her expertise includes policy and regulatory analysis, stakeholder engagement, strategic partnerships, and program implementation. Previously, she served as Vice President of State Programs for the California Association of Health Plans and as a Branch Chief at the Department of Health Care Services. Athena began her career as a Presidential Management Fellow with the Centers for Medicare and Medicaid Services.

**Speakers**

**Susan DeMarois, Director, California Department of Aging**



Susan DeMarois was appointed by Governor Gavin Newsom to serve as Director of the California Department of Aging on November 1, 2021. In this role, she leads California's State Unit on Aging, overseeing a broad range of home and community-based services while advocating for older adults, people with disabilities, and family caregivers. The department holds primary responsibility for implementing the Governor's Master Plan for Aging – California's 10-year blueprint that calls on all sectors of government and society to build an age and disability forward state by 2030 when one in four people will be 60 or older.

Since taking on this role, Director DeMarois and her team have led 46 new initiatives, focusing on strengthening the direct care workforce, rebuilding community infrastructure post-pandemic, raising awareness of aging and disability services, and bridging the digital divide for older adults. Her top priority has been creating a "No Wrong Door" system across California communities, with Area Agencies on

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Aging, Caregiver Resource Centers and Aging and Disability Resource Connections as key partners in building a future-ready network.

Prior to her appointment, Director DeMarois spent over a decade as the California lobbyist and government affairs director for the national Alzheimer's Association. Her career also includes leadership roles in government and community relations at UC Davis Health System, and early experience with LeadingAge California.

**Lauren Gavin Solis, MPH, Deputy Director,  
Office of Medicare and Medicaid Integration,  
Department of Health Care Services**



Lauren Gavin Solis is the Chief of the DHCS Office of Medicare Innovation and Integration, providing focused leadership for Medicare topics in California, including both dually eligible and Medicare-only beneficiaries. Prior to joining DHCS in 2025, she spent 12 years at the federal Medicare-Medicaid Coordination Office at

CMS, most recently serving as the Acting Director of the Models, Demonstrations, and Analysis Group. Lauren also previously served as a Presidential Management Fellow at the National Institutes of Health, and worked for the National Coalition on Health Care and Triage Consulting Group. Lauren holds an MPH from the Johns Hopkins Bloomberg School of Public Health and a BA from the University of California at Davis.

**Mary Watanabe, Director,  
Department of Managed Health Care**



Mary Watanabe is the Director of the California Department of Managed Health Care, the state entity that oversees health plans that provide health care services to over 30 million Californians. As Director, Mary is responsible for protecting consumers' health care rights and ensuring a stable health care delivery

system in accordance with federal and state rules. Mary joined the department in 2015 as the Deputy Director for Health Policy and Stakeholder Relations, where she was responsible for fostering proactive and effective relations between the DMHC and its stakeholders, while serving as primary advisor to the Director on critical issues and providing strategic planning and policy direction on emerging issues and industry trends. Prior to joining the DMHC, Mary served as Deputy Director for the Sales Division at Covered California, where she oversaw the implementation of the Navigator Grant Program, the Outreach and Education Grant Program and the engagement of community partners to educate consumers and small business owners about the health care options available through Covered California.

Mary holds a bachelor's degree in psychology from California State University, Sacramento.

**Closing Remarks**

**3:45 pm – 4:00 pm**

**Athena Chapman, MPP, President,  
Chapman Consulting**

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Chapman Consulting is a boutique health policy consulting firm based in Sacramento, California. We help organizations navigate the complexities of federal and state policy through strategic planning, stakeholder engagement, operational and implementation support. Our team provides regulatory and policy analysis, in depth research, and both virtual and on-site training.

We bring expertise in Medicare, Medicaid, Covered CA, and commercial insurance, offering real-time insights to help clients anticipate and respond to a rapidly evolving landscape. From project management to publication-ready reports, we consistently deliver high-quality, actionable solutions that can drive meaningful outcomes for the people our clients serve.



## Our Team

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Thank you for being part of our inaugural State of Medicare in California convening. Scan the QR code to stay connected with Chapman Consulting, and we look forward to seeing you again soon.

